



Canada Border  
Services Agency

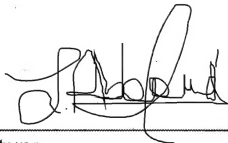
Agence des services  
frontaliers du Canada

TASK AUTHORIZATION				
Contractor: BMB Data Consulting Services Inc.		Contract Number: 5500000869		
Requisition Number: 1000324333		Financial Coding: 1920-600-80;1950 400 40		
Task Number: 2019001531		Date: September 28, 2018		
TA Request				
1. Description of Work to be Performed As per Annex A - Statement of Work attached.				
2. PERIOD OF SERVICES estimated:		From:	2018-09-29	To: 2019-09-28
3. Work Location		333 North River Road, Ottawa, ON K1A 0L8 or other CBSA offices in the National Capital Region		
4. Travel Requirements		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No Specify:		
5. Other Conditions /Restraints		As per the contract		
6. Task Proposal		Estimated Cost <input checked="" type="checkbox"/>	Fixed Price <input type="checkbox"/>	
7. LEVEL OF SECURITY CLEARANCE REQUIRED FOR THE CONTRACTOR'S PERSONNEL				
<input type="checkbox"/> Reliability Status <input checked="" type="checkbox"/> Secret <input type="checkbox"/> Top Secret <input type="checkbox"/> Other				
TA Proposal				
8. Estimated Cost Contract				
Category (Level) and Name of Proposed Resource	PWGSC Security File Number	Firm Per Diem Rate	Estimated # of Days	Total cost
Enterprise Architect Level 3 (Resource #2)				\$318,000.00
Enterprise Architect Level 3 (Resource #2)				\$318,000.00
Professional services estimated cost			Total	\$636,000.00
			HST	\$82,680.00
			Grand Total	\$718,680.00
Travel & Living (if applicable)			Estimated Cost	\$0.00
			Total Travel & Living Cost	\$0.00
			Grand Total for Labour and Travel	\$718,680.00
TA Approval				
9. Signing Authorities				
Name & Title of Individual Authorized to Sign on behalf of the Contractor (print)	Signature		Date	
Shane A. Vanier A/Manager Business Reporting Support/Innovation, Science and Technology Branch CBSA			28/09/2018	
Name & Title of Individual Authorized to Sign as the Technical Authority (print)	Signature		Date	
			Oct. 1, 2018	



Canada Border  
Services Agency

Agence des services  
frontaliers du Canada

<p><b>Linda Abboud</b> Senior Contracting Officer, SPD, CBSA</p> <p>Name &amp; Title of Individual Authorized to Sign as the Contracting Authority (print)</p>	 <p>Signature</p>	<p><u>October 1, 2018</u></p> <p>Date</p>
<p><b>10. Basis of Payment &amp; Invoicing</b></p> <p>In Accordance with the article entitled "Basis of Payment" in the Contract.</p> <p>Payment to be made based on receipt of detailed monthly invoices for services rendered, subject to full acceptance by the Project/Technical Authority. Total of payments not to exceed the grand total.</p> <p>Original invoices shall be sent to the Project/Technical Authority. One copy of each invoice, together with attachments, shall be sent to the Contracting Authority.</p>		



## STATEMENT OF WORK

### 1. TITLE

Two (2) Enterprise Architect Level 3

### 2. BACKGROUND

In 2011, the CBSA Executive Committee approved the Agency's Information Management (IM) Strategy and a supporting IM Action Plan. Since that time, great strides have been made to design, develop, and deliver key IM instruments and tools including: an Agency policy on IM; a functionally-based business information classification scheme (BCS), an Agency electronic document and records management application (GCDocs), and a Records Disposition Authority issued by the Library & Archives Canada.

In addition to implementing the IM Strategy, the Enterprise Information Management division is also responsible for a number of transformational initiatives, including implementing the Agency's Open Government framework (Open Information, Open Data, and Open Dialogue), and supporting the Agency's data analytics capabilities from an IM standpoint.

### 3. OBJECTIVE

To advance and evolve the CBSA's Enterprise Information Architecture (EIA) framework and to augment on-going efforts to implement the Agency's IM Strategy and IM Action Plan, with the following goals:

- To assist the Agency's IM division with achieving the GC Open Government Directive requirements
- To advance the Agency's data analytics capabilities by providing IM guidance and expertise relating to data literacy and the Business Intelligence (BI) area
- To deliver strategic IM/BI change initiatives through providing expertise with the management of structured and unstructured information and data assets
- To identify and plan business IM/BI related transformation activities

### 4. SCOPE

The Enterprise Architects are responsible for:

- Conduct an environmental scan of the Agency's current state of data literacy, reporting architectures, strategies, technologies and processes;
- Assess the Agency's current level of maturity in all data literacy and reporting areas (e.g. analytical, operational, etc.);
- Recommend a future state vision for enterprise data literacy and reporting that will allow the Agency to address its current operational requirements and align with the future architectural vision;  
Provide advice and guidance in the implementation of a road-map (short/medium/long term) for enterprise data literacy and reporting that will provide timely and accurate information provisioning to support decision making.

### 5. TASKS

The proposed resource will be required to perform the following tasks:

- Organize and chair workshops, interview sessions and JAD sessions with business stakeholders, technical experts, management and other SMEs to gather business and technical reporting requirements;
- Research industry best practices on data literacy and enterprise reporting;
- Conduct fit-gap analysis to determine strengths and areas of improvements in all areas reporting;



Canada Border Services Agency      Agence des services frontaliers du Canada

- Conduct technology, people, and process environmental scan;
- Prepare presentation materials and present to a wide variety of audience;
- Develop strategies and roadmaps to position the Agency to the desired future state for enterprise data literacy and business intelligence reporting

## 6. DELIVERABLES AND ACCEPTANCE CRITERIA

All artefacts must be prepared and submitted using the suite of Microsoft applications. All written project deliverables will be provided in English. Deliverables will be provided in both soft and hard copy (when required).

The Contractor shall provide the following deliverables:

Deliverables (Resource 1)	Schedule
<b>Resource # 1</b>	
<p>Conduct an environmental scan of the current state of the Agency's data literacy plans, initiatives and training programs, resources, assets, etc.</p> <p>Deliverable 1. Data Literacy Scan</p>	<p>Draft document required by within 20 business days of being requested.</p> <p>Preliminary Date - October 31, 2018</p> <p>Final document required by within 5 business days of being requested.</p> <p>Final Date - November 9, 2018</p>
<p>Determine the scope of the data literacy program - e.g. role development, people development, data/information delivery tool focus, etc. and develop a data literacy program charter that includes the following components: program objectives, success measures, operating model, modules, audience, curriculum, delivery approach and technology roadmaps.</p> <p>Deliverable 2. Data Literacy Program Charter</p>	<p>Draft document required by within 40 business days of being requested.</p> <p>Preliminary Date - January 4, 2019</p> <p>Final document required by within 5 business days of being requested.</p> <p>Final Date - January 11, 2019</p>
<p>Establish a program management function and identify the required resources for establishing and operating the program; Prepare a detailed operating plan for establishing and operating the program; Develop performance measurement metrics and evaluation procedures for measuring the effectiveness of the program</p> <p>Deliverable 3. Data Literacy Program Detailed Operating Plan</p>	<p>Draft document required by within 25 business days of being requested.</p> <p>Preliminary Date - February 15, 2019</p> <p>Final document required by within 5 business days of being requested.</p> <p>Final Date - February 22, 2019</p>
<p>Review details of the Officer Induction Training Program and the Officer Development Training Program; Determine planned career streams and training plans; Research best practices from - Government(s), Industry, Educational Institutions; and Determine Agency role requirements for "Data" related skills</p> <p>Deliverable 4. CBSA Role Requirements for Data Literacy Program</p>	<p>Draft document required by within 20 business days of being requested.</p> <p>Preliminary Date - March 22, 2019</p> <p>Final document required by within 5 business days of being requested.</p>

Canada Border  
 Services Agency

Agence des services  
 frontaliers du Canada

	Final Date - March 31, 2019
Identify future candidate skills and competencies required; Identify required technology experience - computers, software, Excel, Access, etc.; Determine evaluation/ testing approach; Design/refine recruiting processes and steps; and Determine if the Data Literacy Program could be used to increase candidate interest and retention	Draft document required by within 20 business days of being requested.  Preliminary Date - April 26, 2019  Final document required by within 5 business days of being requested.
Deliverable 5. CBSA Future candidate skill and competency requirements	Final Date - May 3, 2019
Research best practices from - Government(s), Industry, Educational Institutions; Develop Training module/assets sourcing approach - build versus buy; Training curriculum design and development - Classroom, On-the-Job, etc.; Training delivery options - internal versus external partners; and, Training delivery approach - classroom, on-line, on the job mentoring, etc.	Draft document required by within 60 business days of being requested.  Preliminary Date - July 31, 2019  Final document required by within 10 business days of being requested.
Deliverable 6. Data Literacy Training Curriculum and Delivery Approach	Final Date - July 16, 2019
Identify Software requirements for the development of training modules/assets; Software requirements for training delivery - Excel, Cognos, SPSS, etc.; Training delivery methods - online labs, sample data bases, online tutorials, self-pace; Data requirements for training program - CBSA specific versus generic data; Establishment, refresh, support and maintenance of the DLP technical environments; Training room requirements - capacity, PCs, Laptops, Projectors/Screens, etc.; Delivery locations - Headquarter versus Regional office delivery; Travel requirements and funding approaches; and, Building/room access and security requirements - personal property and Agency assets	Draft document required by within 50 business days of being requested.  Preliminary Date - September 20, 2019  Final document required by within 10 business days of being requested.
Deliverable 7. Data Literacy Training Environment Requirements	Final Date - September 31, 2019
Conduct a concrete analysis of the importance on the deployment of Cognos V11.x (Cognos Analytics) throughout CBSA and develop a strategy to ensure that the importance is highlighted for the Agency. Deliverable 8. Cognos V11.x Implementation Analysis and Realization Strategy	Draft document required by within 40 business days of being requested.  Preliminary Date - March 31, 2019  Final document required by within 10 business days of being requested.
	Final Date - April 10, 2019
Develop in-depth recommendations on a structural approach of self-service to complement service standards for Business Reporting Services.	Draft document required by within 30 business days of being requested.  Preliminary Date - January 31, 2019

Canada Border Services Agency      Agence des services frontaliers du Canada

Deliverable 9. Cognos Self-Service Strategy	Final document required by within 5 business days of being requested. Final Date - February 8, 2019
Presentations to summarize recommendations and findings, and business case proposals as required.	Draft document required by within 20 business days of being requested.  Final document required by within 5 business days of being requested.  Date Range - Start of Contract - end of Contract
Provide meeting agendas, supporting materials, and records of decisions as required by the Project Authority.	Within 2 days of request. Date Range - Start of Contract - end of Contract
Provide Standard Operating Procedures and/or instruction guides for any deliverables/tools that the contractor is responsible for producing.	Within 10 days of request. Date Range - Start of Contract - end of Contract
<b>Resource # 2</b>	
Release 795 - Secondary Passage Processing and BIO-X passage  As a Technical Team Leader:  Create and update an SLMF architecture documents;  Coordinate project delivery phases, organize meetings for design, development and project issues reviews;  Support team members;  Support Project Manager;  Interact with service team on requirements clarifications and solution delivery;  Interact with Data Management team on data provisioning and project deployment process;	Release activities are on-going, end of development November 2019
Release 795 - Secondary Passage Processing and BIO-X passage  As a Data Modeler:  Create Conceptual, Logical and Physical Data models in support of Release R7985 delivery;  Participate in review sessions;  Support team members in understanding data model;  Interact with service team on requirements clarifications;  Interact with Data Management team on	Release activities are on-going, end of development November 2019

Canada Border  
Services Agency

Agence des services  
frontaliers du Canada

physical model deployment;	
Release 795 - Secondary Passage Processing and BIO-X passage As a Data Analyst: Analyze data sources for release solution; Communicate with representatives from Application and Modelling source system teams; Participate in review sessions; Support team members in understanding of data sources and targets for solution delivery; Create ETL specifications; Support ETL, BI and Test Team members in solution delivery;	Release activities are on-going, end of development November 2019
PPP initiative Engage in earlier business requirements gathering sessions to minimize the implementation analysis effort.	Estimated work start timeline is 2020
R408 / 409 ERSS Intake Create and maintain data model for R408/409 solution.	Release is complete, support is ongoing
As BASD Technical Team lead to participate in architectural decisions to improve delivery and increase development efficiency.	ongoing
As BASD Data Analyst to provide Business Intelligence Impact Estimates for Amendment Requests, Validated Requirement and Change Requests.	ongoing
As DM modeler to create Conceptual, Logical and Physical Data Models for ongoing projects	ongoing

## 7. CLIENT SUPPORT

The majority of the work will be conducted on-site at CBSA premises in the National Capital Region. The CBSA will ensure that appropriate subject matter experts from within the Agency are available to the Contractors as required to provide input, answer questions, evaluate deliverables and participate in meetings, to enable him/her to proceed on schedule with the completion of all assigned deliverables.

The CBSA will provide for translation of applicable documents developed by the Contractors.

As required, the CBSA will provide the Contractors with other assistance as deemed necessary to enable him/her to proceed on schedule with the completion of assigned deliverables.

The CBSA will provide project documentation such as background information, operational and technical procedures.



Canada Border Services Agency      Agence des services  
frontaliers du Canada

The contractor will be provided with a CBSA user ID, password, workstation or laptop, and other materials as required in order to process, store, and/or transmit CBSA data on the CBSA network during the contract. The use of contractor IT systems is not permitted. At no time and in no way is CBSA data to be removed from CBSA sites, nor will access to or from the contractor's IT systems through the use of a session or link (e.g. VPN) be permitted. The contractor must comply with CBSA internal security policies, directives, standards, and guidelines at all times during the contract.

#### 8. REPORTING REQUIREMENTS

It is the responsibility of the Contractor to facilitate and maintain regular communication with the Technical Authority. Status updates, verbal or written, may be requested by the Technical Authority over the course of the contract. Communication is defined as all reasonable effort to inform all parties of plans, decisions, proposed approaches, implementation, and results of work, to ensure that the project is progressing well and in accordance with expectations. Communication may include: phone calls; electronic mail; and meetings. In addition, the Contractor is to immediately notify the Technical Authority of any issues, problems or areas of concern in relation to any work completed under the contract, as they arise.

#### 9. WORK LOCATION

- Canada Border Services Agency (CBSA) regular working hours are Monday to Friday, between 7 a.m. to 6 p.m. Eastern Time (Standard Workday).
- Work will be performed at the CBSA location at Vanier Towers, 333 River Road, Ottawa, ON
- The contractor may occasionally be required to work remotely during non-standard hours, i.e. on evenings or weekends at regular rate

#### 10. LANGUAGE OF WORK

The proposed resource will be required to perform the work in English. Every individual proposed in its bid must be English and must be able to communicate orally and in writing without any assistance and with minimal errors.

[http://www.international.gc.ca/ifait-iaeci/test\\_levels-niveaux.aspx?lang=eng#b](http://www.international.gc.ca/ifait-iaeci/test_levels-niveaux.aspx?lang=eng#b)







Canada Border  
Services Agency

Agence des services  
frontaliers du Canada

TASK AUTHORIZATION				
Contractor: BMB Data Consulting Services Inc.		Contract Number: 5500000869		
Requisition Number: 1000324333		Financial Coding: 1920-600-80;1950 400 40		
Task Number: 2019001531		Date: January 31, 2020		
Amendment #: 001				
TA Request				
Amendment: Amendment 001 is raised to extend the end date from September 28, 2019 to January 31, 2020				
1. Description of Work to be Performed As per Annex A - Statement of Work attached.				
2. PERIOD OF SERVICES estimated:		From:	2018-09-29	To: 2020-01-31
3. Work Location		333 North River Road, Ottawa, ON K1A 0L8 or other CBSA offices in the National Capital Region		
4. Travel Requirements		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No Specify:		
5. Other Conditions /Restraints		As per the contract		
6. Task Proposal		Estimated Cost <input checked="" type="checkbox"/>	Fixed Price <input type="checkbox"/>	
7. LEVEL OF SECURITY CLEARANCE REQUIRED FOR THE CONTRACTOR'S PERSONNEL				
<input type="checkbox"/> Reliability Status <input checked="" type="checkbox"/> Secret <input type="checkbox"/> Top Secret <input type="checkbox"/> Other				
TA Proposal				
8. Estimated Cost Contract				
Category (Level) and Name of Proposed Resource	PWGSC Security File Number	Firm Per Diem Rate	Estimated # of Days	Total cost
Enterprise Architect Level 3 (Resource #2)				\$318,000.00
Enterprise Architect Level 3 (Resource #2)				\$318,000.00
Professional services estimated cost			Total	\$636,000.00
			HST:	\$82,680.00
			Grand Total	\$718,680.00
Travel & Living (if applicable)			Estimated Cost	\$0.00
			Total Travel & Living Cost	\$0.00
Grand Total for Labour and Travel				\$718,680.00
TA Approval				
9. Signing Authorities				
CARL DRODGE PRESIDENT & CEO Name & Title of Individual Authorized to Sign on behalf of the Contractor (print)			Sept 27/19 Date	
Shane A. Vanier A/Manager Business Reporting Support/Innovation, Science and Technology Branch CBSA	Bev Casselman 		Sept 30, 2019	



Canada Border  
Services Agency

Agence des services  
frontaliers du Canada

Name & Title of Individual Authorized to Sign as the Technical Authority (print)	Signature	Date
Linda Abboud Senior Contracting Officer, SPD, CBSA	<b>ABBOUD</b>  <b>LINDA</b>	Digitally signed by ABBOD LINDA DN: c=ca, o=gc, ou=ccra-adrc, ou=PERSONNEL, cn=ABBOUD LINDA, serialNumber=2017264160441093 Date: 2019.09.27 21:08:42 -04'00'
Name & Title of Individual Authorized to Sign as the Contracting Authority (print)	Signature	Date
<b>10. Basis of Payment &amp; Invoicing</b>		
<p>In Accordance with the article entitled "Basis of Payment" in the Contract.</p> <p>Payment to be made based on receipt of detailed monthly invoices for services rendered, subject to full acceptance by the Project/Technical Authority. Total of payments not to exceed the grand total.</p> <p>Original invoices shall be sent to the Project/Technical Authority. One copy of each invoice, together with attachments, shall be sent to the Contracting Authority.</p>		



Canada Border  
Services Agency

Agence des services  
frontaliers du Canada

Contract No. / N° du contrat : 5500000869

## APPENDIX B TO ANNEX A - TASK AUTHORIZATION (TA) FORM

TASK AUTHORIZATION			
Contractor Name:	BMB Data Consulting Services Inc.	Contract Number:	5500000869
Requisition Number:	1000324333	Financial Coding:	1920-600-80; 1950 400 40
Task Number:	2019001531	Date:	Nov. 20, 2019
Amendment Number:	002		
<b>TA Request</b>			
Amendment 002 is raised to extend the number of days (& dollars) on this TA, so as to complete the associated work.			
1. See attached Statement of Work			
2. PERIOD OF SERVICES	From: 2018-09-29	To: 2020-01-31	
3. Work Location	333 North River Road, Ottawa, Ontario, K1A 0P8 or other CBSA offices in the NCR.		
4. Other Conditions /Restraints	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No Specify: As per the contract.		
5. Travel Requirements	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No Specify:		
6. Task Proposal	Estimated Cost <input checked="" type="checkbox"/> Fixed Price <input type="checkbox"/>		
<b>7. LEVEL OF SECURITY CLEARANCE REQUIRED FOR THE CONTRACTOR'S PERSONNEL</b>			
<input type="checkbox"/> Reliability Status <input type="checkbox"/> Confidential <input checked="" type="checkbox"/> Secret <input type="checkbox"/> Not Applicable			
<b>TA Proposal</b> [For completion by Contractor]			
<b>8. Estimated Cost Contract</b>			
Category of Proposed Resource and name	Firm Per Diem Rate	Estimated # of Days	Total cost
Enterprise Architect, Level 3 (Resource # 1) line 20			\$331,250.00
Enterprise Architect, Level 3 (Resource # 2) line # 40			\$385,575.00
Sub-total Professional Fees:			\$716,825.00
HST:			\$93,187.25
Total:			\$810,012.25
<b>TA Approval</b>			
<b>9. Signing Authorities</b>			
	Signatures of Authorized Representatives	Date	
Name & Title of Individual Authorized to Sign on Behalf of Contractor: <b>CARL DRODGE</b> <b>PRESIDENT &amp; CEO</b>		Nov 20, 2019	
Name & Title of Individual Authorized to Sign Pursuant to sub-section 32(1) of the Financial Administration Act for CBSA: <b>Daphne Bond, Director</b>		Nov 21, 2019	
Name & Title of Contracting Authority for CBSA:			



Canada Border  
Services Agency

Agence des services  
frontaliers du Canada

Contract No. / N° du contrat : 5500000869

#### 10. Basis of Payment & Invoicing

In Accordance with the article entitled "Basis of Payment" in the Contract.

Payment to be made based on receipt of detailed monthly invoices for services rendered, subject to full acceptance by the Project/Technical Authority. Total of payments not to exceed the grand total.

Original invoices shall be sent to the Project/Technical Authority. One copy of each invoice, together with attachments, shall be sent to the Contract Authority.

ENTERPRISE ARCHITECT - LEVEL 3

M#	Mandatory Requirements	Contractor's Response	
		Demonstrated Experience (Provide description as requested in the Evaluation Disclaimer printed above)	Insert Page # Of Resume (Indicate where in the resume corroborating information can be located)
M1	The proposed resource must have a minimum of 10 years of experience working as an Enterprise Architect.		<p>Pages 3 – 4</p> <p>Pages 6 – 8</p> <p>Page 9 - 10</p>

		<b>Total demonstrated:</b> 135 months; 11 years, 3 months	
<b>M2</b>	The proposed resource must have a minimum of five (5) years of experience in the last eight (8) years collecting, analysing, and managing business requirements on enterprise business intelligence (BI) projects.		<p>Pages 3 – 4</p> <p>Pages 4 – 5</p> <p>Pages 6 – 8</p>
<b>M3</b>	<p>The proposed resource must have a minimum of five (5) years of experience in the last eight (8) years collecting, analysing, and managing business requirements in relation to the following types of enterprise information delivery and reporting initiatives (e.g. corporate reporting, data warehousing, business intelligence) projects.</p> <p>The experience must have been gained based on projects in at least three separate projects.</p>		<p>Pages 3 - 4</p>





		Pages 6 - 8
M5	The proposed resource must have a minimum of two (2) projects collecting and analyzing business requirements for an enterprise financial BI solution that was based on the SAP or Cognos suite of tools with over 500 users using SAP Financials as backend financial data source.	Pages 3 – 4



			<p>Pages 6 – 8</p> <p>Pages 8 - 9</p>
--	--	--	---------------------------------------



M6	<p>The proposed resource must have developed and completed a BI strategy for a GC department or agency within the last five (5) years.</p> <p>Pages 3 - 4</p>		

POINT-RATED REQUIREMENTS

ENTERPRISE ARCHITECT - LEVEL 3

#	Point Rated Criteria	Max Score	Point Grid	Bidder Description and Self Score (Explain how points are obtained and indicate where in the resume corroborating information is located)
R1	The proposed resource should have experience designing data architectures that capture complex data relationships, in an enterprise data warehouse (EDW) environment for a GC department or agency.	10	<p>Less than 5 years = 0 points</p> <p>5 to 8 years = 5 points</p> <p>8+ years = 10 points</p>	

R2	<p>The proposed resource should have experience facilitating, chairing, coordinating, and leading Joint-Application-Development (JAD) sessions, working groups, and/or client meetings to support business intelligence and/or data analytical projects in a Government of Canada environment.</p>	15	<p>Less than 5 years = 0 points</p> <p>5 to 7 years = 5 points</p> <p>7+ to 10 years = 10 points</p> <p>10+ years = 15 points</p>

				Project #11 Pages 0 - 10
R3	The proposed resource should have experience in the last five (5) years developing and completing a BI strategy for a GC department or agency.	30	0 organizations = 0 points 1 organization = 10 points 2 organizations = 20 points 3 or more organizations = 30 points	

				Self Score – 30 Points
R4	The proposed resource should have hands-on experience working on BI projects that use Cognos 10 as report development platform.	10	Less than 1 year = 0 points 1 to 2 years = 5 points 2+ years = 10 points	
R5	The proposed resource should have experience designing the architecture for an enterprise-wide BI or set of BI solutions in a large-scale environment (minimum 100 users) to support enterprise analytical reporting requirements.	25	Less than 2 years = 0 points 2 to 5 years = 10 points 5 to 8 years = 15 points 8+ years = 25 points	

R6	The proposed resource should have recent experience integrating data from SAP Financials into EDW with HR and program data.	20	Less than 1 year = 0 points 1 to 2 years = 10 points 2+ years = 20 points	



Total		110		Total Self Score - 110
Minimum Threshold (80 %)		88		



Public Works and  
Government Services  
Canada

Travaux publics et  
Services gouvernementaux  
Canada

## TASK AUTHORIZATION FORM FORMULAIRE D'AUTORISATION DE TÂCHES

### PART 1 (completed by the Technical/Project Authority) / PARTIE 1 (complété par le Responsable technique / Chargé du projet)

#### A. General Information / Informations générales

Contract Number / Numéro du contrat : <b>47419-223800/002/EL - Donna Cona</b>	
Contractor Name / Nom du Contracteur : <b>Donna Cona.</b>	
Task Authorization (TA) No. N° de l'autorisation de tâches (AT) :	Commitment No. N° de l'engagement :
Financial Coding Code financier :	Date of Issuance Date d'émission :
Response required by Réponse requise d'ici le :	
2020001612	1000349073
192060080, 2001, 30700	March 16, 2020
March 16, 2020	

#### B. For Amendments Only / Aux fins de modification seulement

Amendment No. / N° de la modification : <b>1</b>
Reason for the Amendment / Raison pour la modification :
<b>This Task Authorization Amendment is raised to change the end date of the Task Authorization from October 31, 2021 to July 8, 2021 without adding any new funds.</b>

#### C. TA Requirements / Exigences relatives à l'AT

Required Resource(s) / Ressource(s) requise(s)			
Category and Level Catégorie et Niveau	Estimated Level of Effort (days) / Niveau d'effort estimatif (jours)	Linguistic Profile / Profil linguistique	Required Level(s) of Security / Niveau(x) de sécurité requis
Technology Architect Level 3	days for each resource	English / Anglais	Reliability/ Secret
Work is to be performed in accordance with Annex A (Statement of Work).			
See attached / Voir pièce jointe			

#### Period of Services / Période de service:

Initial Start Date / Date de début initiale :	<b>12-Nov-2019</b>	Initial End Date / Date de fin initiale :	<b>08-Jul-2021</b>
Extended End Date (See Reason for the Amendment) / Date de fin prolongée (voir Raison pour la modification):			
<input type="checkbox"/> Option To Extend Initial End Date / Option pour prolonger la date de fin initiale			
Optional End Date(s) / Date(s) de fin optionnelle(s)	Status / Statut		
	<input type="radio"/> In Effect / en vigueur		
Travel Requirement(s) / Exigence(s) de voyage : <b>None</b>			
Work Location(s) / Lieu(x) de travail :	<b>Within the National Capital Region on CBSA premises</b>		

### PART 2 (completed by the Contractor and/or the Technical/Project Authority) / PARTIE 2 (complété par le Contracteur et/ou le Responsable technique / Chargé du projet)

#### Contractor Resource(s) and Estimated Cost / Ressource(s) du Contracteur et Coût total estimatif

Note: once approved, only the following resources may provide services under this TA. / Nota : une fois approuvée, seules les ressources suivantes peuvent fournir des services sous la présente AT

Name / Nom Category and Level / Catégorie et Niveau	PWGSC Security File No. / N° du dossier de sécurité TPSGC	Linguistic Profile / Profil linguistique	Per Diem Rate / Taux journalier	Estimated Level of Effort (days) / Niveau d'effort estimatif (jours)	Total Estimated Cost / Coût total estimatif
Technology Architect (Data Warehouse) - Level 2					\$484,800.00

Estimated Cost / Coût estimatif		<b>\$484,800.00</b>
Total Estimated Travel and Living Cost / Coût total estimatif de voyage et de vie		\$0.00
Total Estimated Cost / Coût total estimatif		<b>\$484,800.00</b>
Applicable Tax / Taxe		<b>\$63,024.00</b>
Total Estimated Cost With Tax / Coût total estimatif avec taxe		<b>\$547,824.00</b>
Check applicable Basis of Payment / Cocher la Base de Paiement applicable :	Maximum Price / Prix Maximum :	<input type="checkbox"/> Firm Price / Prix Ferme : <input type="checkbox"/>

### PART 3 - TA APPROVAL BY CANADA / PARTIE 3 - APPROBATION DE L'AT PAR LE CANADA

<p>By signing this TA, the authorized client authority and/or the PWGSC Contracting Authority certify(ies) that the content of this TA is in accordance with the conditions of the Contract.</p> <p>The client's authorization limit is \$150,000. When the value of a TA and its amendments (excluding Applicable Taxes) is in excess of this limit, the TA must be signed by the authorized client and forwarded to the PWGSC Contracting Authority for authorization.</p>	<p>En apposant sa signature sur l'AT, le client autorisé et/ou l'autorité contractante de TPSGC atteste(nt) que le contenu de cette AT est conforme aux conditions du contrat.</p> <p>La limite d'autorisation du client est 150,000 \$. Lorsque la valeur de l'AT et ses modifications (excluant les taxes applicables) dépasse cette limite, l'AT doit être signée par le client autorisé et transmise à l'autorité contractante de TPSGC pour autorisation.</p>
<p>Name of Technical Authority / Nom de l'autorité technique: <b>GAUL NATHALIE</b></p> <p>Date: 2020.03.19 11:54:36 -04'00'</p> <p>Digitally signed by GAUL NATHALIE</p>	<p>Name of Contracting Authority / Nom de l'autorité contractante: <b>CHADHA SAMPAN</b></p> <p>Date: 2020.03.18 11:34:42 -04'00'</p> <p>Digitally signed by CHADHA SAMPAN</p>

### PART 4 - CONTRACTOR SIGNATURE / PARTIE 4 - SIGNATURE DU CONTRACTEUR

<p>DocuSigned by: <b>2020-03-19</b></p>	
<p>Name and title of individual authorized to sign on behalf of the Contractor / Nom et titre Signature de la personne autorisée à signer au nom de l'entrepreneur</p>	<p>Signature _____ Date _____</p>



Public Works and  
Government Services  
Canada

Travaux publics et  
Services gouvernementaux  
Canada

## TASK AUTHORIZATION FORM FORMULAIRE D'AUTORISATION DE TÂCHES

**PART 1** (completed by the Technical/Project Authority) / **PARTIE 1** (complétée par le Responsable technique / Chargé du projet)

### A. General Information / Informations générales

Contract Number / Numéro du contrat : **47419-223800/002/EL - Donna Cona**

Contractor Name / Nom du Contracteur : **Donna Cona**

Task Authorization (TA) No. N° de l'autorisation de tâches (AT)	Commitment No. N° de l'engagement	Financial Coding Code financier	Date of Issuance Date d'émission	Response required by Réponse requise d'ici le
1000349073	2020001612	192060080	2019-11-08	12-Nov-2019

### B. For Amendments Only / Aux fins de modification seulement

Amendment No. / N° de la modification :

Reason for the Amendment / Raison pour la modification:

### C. TA Requirements / Exigences relatives à l'AT

Required Resource(s) / Ressource(s) requise(s)

Category and Level Catégorie et Niveau	Estimated Level of Effort (days) / Niveau d'effort estimatif (jours)	Linguistic Profile / Profile linguistique	Required Level(s) of Security / Niveau(x) de sécurité requis
Technology Architect (Data Warehouse) - Level 2	days for each resource	English	Reliability/ Secret

Statement of Work (tasks, deliverables, reports, etc.) / Énoncé des travaux (tâches, livrables, rapports, etc.):

**See attached / Voir pièce jointe**

### Period of Services / Période de service:

Initial Start Date / Date de début initiale :

**12-Nov-2019**

Initial End Date / Date de fin initiale :

**31-Oct-2021**

Extended End Date (See Reason for the Amendment) / Date de fin prolongée (voir Raison pour la modification):

☐ Option To Extend Initial End Date / Option pour prolonger la date de fin initiale

Optional End Date(s) / Date(s) de fin optionnelle(s)	Status / Statut
	<input checked="" type="radio"/> In Effect / en vigueur

Travel Requirement(s) / Exigence(s) de  
voyage :

None

Work Location(s) / Lieu(x) de travail :

National Capital Region, Ottawa

**PART 2 (completed by the Contractor and/or the Technical/Project Authority) / PARTIE 2 (complétée par le Contracteur et/ou le Responsable technique / Chargé du projet)**

**Contractor Resource(s) and Estimated Cost / Ressource(s) du Contracteur et Coût total estimatif**

Note: once approved, only the following resources may provide services under this TA / Nota : une fois approuvée, seules les ressources suivantes peuvent fournir des services sous la présente AT

Name / Nom Category and Level / Catégorie et Niveau	PWGSC Security File No. / N° du dossier de sécurité TPSGC	Linguistic Profile / Profil linguistique	Per Diem Rate / Taux journalier	Estimated Level of Effort (days) / Niveau d'effort estimatif (jours)	Total Estimated Cost / Coût total estimatif
Technology Architect (Data Warehouse) - Level 2					\$484,800.00
Estimated Cost / Coût estimatif					\$484,800.00
Total Estimated Travel and Living Cost / Coût total estimatif de voyage et de vie					\$0.00
Total Estimated Cost / Coût total estimatif					\$484,800.00
Check applicable Basis of Payment / Cocher la Base de Paiement applicable :		Maximum Price / Prix Maximum :		Firm Price / Prix Ferme :	
		<input type="checkbox"/>		<input type="checkbox"/>	

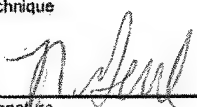

**PART 3 - TA APPROVAL BY CANADA / PARTIE 3 - APPROBATION DE L'AT PAR LE CANADA**

By signing this TA, the authorized client authority and/or the PWGSC Contracting Authority certify(ies) that the content of this TA is in accordance with the conditions of the Contract.

The client's authorization limit is \$300,000. When the value of a TA and its amendments (excluding Applicable Taxes) is in excess of this limit, the TA must be signed by the authorized client and forwarded to the PWGSC Contracting Authority for authorization.

En apposant sa signature sur l'AT, le client autorisé et/ou l'autorité contractante de TPSGC atteste(nt) que le contenu de cette AT est conforme aux conditions du contrat.

La limite d'autorisation du client est \$300,000. Lorsque la valeur de l'AT et ses modifications (excluant les taxes applicables) dépasse cette limite, l'AT doit être signée par le client autorisé et transmise à l'autorité contractante de TPSGC pour autorisation.

Nathalie Gaul		2019-12-03		BITSENE		Digitally signed by	
Name of Technical Authority / Nom de l'autorité technique		Date		Name of Contracting Authority / Nom de l'autorité contractante		BITSENE, MARLENE	
						Date: 2019.11.19	
Signature				Signature		17:56:20 -05'00'	
(If applicable, insert the following) Name of the representative from (insert the Department name)		Date					
(Ajouter ce qui suit, s'il y a lieu) Nom du représentant de (insérer le nom du Ministère)							
Signature							

**PART 4 - CONTRACTOR SIGNATURE / PARTIE 4 - SIGNATURE DU CONTRACTEUR**

Name and Title of individual authorized to sign on behalf of the Contractor / Nom et titre Signature de la personne autorisée à signer au nom de l'entrepreneur		Signature		Date	
				11.19.2019	

## Security

Security Information	Requested Information
Name of individual as it appears on security clearance application form	
Level of security clearance obtained and expiry date	
Validity period of security clearance obtained	
Security Screening Certificate and Briefing Form file number	

### 1. Mandatory Technical (MT) Criteria

TBIPS Category: I.13 Technology Architect (Data Warehouse) – Level 2			
Name of Resource: [REDACTED]			
#	Mandatory Technical (MT) Criteria	Bidder's Response Demonstrated Experience	Insert Page # of Resume
MT1	The bidder must demonstrate that the proposed resource has a minimum of 5 years of experience, within the last 10 years*, working as a Technology Architect in a Data Warehouse development environment. The proposed resource must have performed at least 15 of the 26 tasks listed in the Statement of Work.		
	The substantiation must not simply be a repetition of the tasks, but must explain responsibilities and demonstrate how the proposed resource carried out the work while performing the tasks.		Page 3 Page 4
MT2	The bidder must demonstrate that the proposed resource has a minimum of 5 years of experience, within the last 10 years*, implementing data warehousing in an Extract, Transform and Load (ETL) environment.		Page 3

TBIPS Category: I.13 Technology Architect (Data Warehouse) – Level 2			
Name of Resource <span style="background-color: black; color: black;">[REDACTED]</span>			
#	Mandatory Technical (MT) Criteria	Bidder's Response Demonstrated Experience	Insert Page # of Resume
			Page 4
MT3	<p>The bidder must demonstrate that the proposed resource has a minimum of 3 years of experience, within the last 6 years*, using IBM InfoSphere DataStage (8.0) or higher as the primary tool to acquire data from a Database Management System.</p> <p>Example: Loading Mainframe, Sybase, SQL Server (or data source equivalent) source into a Data Warehouse environment.</p>		Page 3 Page 4
MT4	<p>The bidder must demonstrate that the proposed resource has a minimum of 3 years of experience, within the last 6 years*, scripting within a Unix environment.</p>		Page 4



TBIPS Category: I.13 Technology Architect (Data Warehouse) – Level 2			
Name of Resource: [REDACTED]			
#	Mandatory Technical (MT) Criteria	Bidder's Response Demonstrated Experience	Insert Page # of Resume
MT5	The bidder must demonstrate that the proposed resource has a minimum of 3 years of experience, within the last 6 years*, with the IBM DB2 RDBMS (Relational Database Management System) in an IBM Infosphere DataStage environment.		Page 3 Page 4
MT6	The bidder must demonstrate that the proposed resource has a minimum of 3 years of experience, within the last 6 years*, shredding XML data types into a Data Warehouse environment.		Page 4

## 2. Rated Technical Criteria

TBIPS Category: I.13 Technology Architect (Data Warehouse) – Level 2				
Name of Resource [REDACTED]				
#	Rated Technical Criteria	Scoring Methodology	Points Max	Cross Reference to proposal (Page #)
RT1	<p>The bidder should demonstrate that the proposed resource has experience working as an IBM Infosphere DataStage ETL Architect in a Data Warehousing environment developing complex* ETL jobs, scripts and/or routines to feed relational and dimensional (star schema) data repositories and resolving ETL performance issues.</p> <p>*complex is defined as a job, script or routine which:</p> <ol style="list-style-type: none"> <li>1) Has two or more join stages or transformer stages</li> <li>2) Has data sources with two or more transformation rules.</li> </ol>	<p>3+ to 4 years = 2 points            4+ to 5 years = 4 points            5+ years = 6 points</p>	6	
RT2	<p>The bidder should demonstrate that the proposed resource has experience as an ETL Architect defining source, target and staging data repositories.</p>	<p>3+ to 4 years = 2 points            4+ to 5 years = 4 points            5+ years = 6 points</p>	6	

TBIPS Category: I.13 Technology Architect (Data Warehouse) – Level 2				
Name of Resource: [REDACTED]				
#	Rated Technical Criteria	Scoring Methodology	Points Max	Cross Reference to proposal (Page #)
RT3	The bidder should demonstrate that the proposed resource has experience as an ETL Architect defining data transformation processes.	3+ to 4 years = 2 points 4+ to 5 years = 4 points 5+ years = 6 points	6	
RT4	The bidder should demonstrate that the proposed resource has experience as an ETL Architect defining volumetric, hardware and software requirements and configurations.	3+ to 4 years = 2 points 4+ to 5 years = 4 points 5+ years = 6 points	6	
RT5	The bidder should demonstrate that the proposed resource has experience developing ETL coding standards and ETL development best practices.	3+ to 4 years = 2 points 4+ to 5 years = 4 points 5+ years = 6 points	6	

TBIPS Category: I.13 Technology Architect (Data Warehouse) – Level 2				
Name of Resource: [REDACTED]				
#	Rated Technical Criteria	Scoring Methodology	Points Max	Cross Reference to proposal (Page #)
				T F r
RT6	The bidder should demonstrate that the proposed resource has experience using ETL Source to Target Mapping documentation, and ETL High Level and Detailed ETL Design documentation, and IBM Infosphere DataStage job documentation.	3+ to 4 years = 2 points 4+ to 5 years = 4 points 5+ years = 6 points	6	N L e c c  F 2 F (  T  F r
RT7	The bidder should demonstrate that the proposed resource has obtained the following certifications:  <ul style="list-style-type: none"> <li>IBM Certified Specialist – PureData System for Analytics</li> <li>IBM Certified Solution Architect</li> </ul> A copy of the certification(s) must be provided at bid closing.	Note: Each certification is worth 3 points for a maximum of 6 points  <ul style="list-style-type: none"> <li>IBM Certified Specialist PureData System for Analytics = 3 points</li> <li>IBM Certified Solution Architect = 3 points</li> </ul>	6	N c  •  •  A p  F r
Total Available points:				
Minimum Total Overall Points Required to be declared responsive:			25	
Total achieved:				

## APPENDIX D TO ANNEX A CERTIFICATIONS AT THE TA STAGE

The following Certifications are to be used, as applicable. If they apply, they must be signed and attached to the Contractor's quotation when it is submitted to Canada.

### 1. CERTIFICATION OF EDUCATION AND EXPERIENCE

The Contractor certifies that all the information provided in the résumés and supporting material proposed for completing the subject work, particularly the information pertaining to education, achievements, experience and work history, has been verified by the Contractor to be true and accurate. Furthermore, the Contractor warrants that every individual proposed by the Contractor for the requirement is capable of performing the Work described in the Task Authorization.

Print name of authorized individual & sign above

October 11, 2019  
Date

### 2. CERTIFICATION OF AVAILABILITY OF PERSONNEL

The Contractor certifies that, should it be authorized to provide services under this Task Authorization, the persons proposed in the quotation will be available to commence performance of the work within a reasonable time from the date of issuance of the valid Task Authorization, or within the time specified in the TA Form, and will remain available to perform the work in relation to the fulfillment of the requirement.

Print name of authorized individual & sign above

October 11, 2019  
Date

### 3. CERTIFICATION OF STATUS OF PERSONNEL

If the Contractor has proposed any individual who is not an employee of the Contractor, the Contractor certifies that it has permission from that individual to propose his/her services in relation to the Work to be performed under this TA and to submit his/her résumé to Canada. At any time during the Contract Period the Contractor must, upon request from the Contracting Authority, provide the written confirmation, signed by the individual, of the permission that was given to the Contractor of his/her availability. Failure to comply with the request may result in a default under the Contract in accordance with the General Conditions.

Print name of authorized individual & sign above

October 11, 2019  
Date

### 4. CERTIFICATION OF LANGUAGE - English

The Contractor certifies that the proposed resource(s) in response to this draft Task Authorization is/are fluent in English. The individual(s) proposed must be able to communicate orally and in writing in English without any assistance and with minimal errors.

Print name of authorized individual & sign above

October 11, 2019  
Date

# Statement of Work

## Enterprise Data Warehouse & Business Intelligence

<b>Contract Number</b>  47419-223800/001/EL – Donna Cona	<b>Task Authorization Number</b>  
<b>Resource Category and Level:</b> Technology Architect (Data Warehouse) Level 2	
<b>Objectives</b> (High-level description of expected outcome)  To advance and evolve the CBSA's Enterprise Architecture, Information Management (EAIM) framework and to augment ongoing efforts to implement the Agency's Strategy on Business Analytics, with the following goals: <ul style="list-style-type: none"> <li>To assist the Agency's IM division with achieving the GC Open Government and Data Analytics Division requirements</li> <li>To advance the Agency's data analytics capabilities by providing IM guidance and expertise relating to data literacy and the Business Intelligence (BI area)</li> <li>To deliver strategic IM/BI change initiatives through providing expertise with the management of structured and unstructured information and data assets</li> <li>To identify and plan business IM/BI related transformation activities</li> </ul>	
<b>Scope of Work</b> (An overview of the work that needs to be done)  The Technology Architect is responsible for: <ul style="list-style-type: none"> <li>Ongoing consultation with CBSA stakeholders to assist with multiple analytics projects, in the domain of business intelligence and data analytics</li> <li>Assess technologies, processes, procedures and develop associated roadmaps in these domains</li> <li>Report directly to the Manager, Open Government and Data Analytics Division</li> </ul>	
<b>Tasks</b>  Tasks and responsibilities could include but not limited to: <ol style="list-style-type: none"> <li>Develop technical architectures, frameworks and strategies to meet the business and application requirements for a large-scale data warehousing initiative in an ETL (Extract, Transform and Load) environment</li> <li>Identify the business, IT and application policies and requirements that drive out a particular solution</li> <li>Ensure the integration of all aspects of technology solutions are consistent with the stated vision</li> </ol>	

4. Perform impact analysis by required due dates of applicable technology changes when requested
5. Provide ETL, DataStage and applicable support to applications and/or technical support teams in the proper application of existing infrastructure
6. Review in-house or developed application and program design or technical infrastructure design to ensure adherence to enterprise and development standards and to recommend performance improvements to stakeholders
7. Assess the feasibility of migrating from the current state to the target business architecture and enabling technologies and identify the risks associated with migrating to the target business architecture and technologies and make recommendations for risk mitigation
8. Manage the development and implementation of an architectural improvement plan (strategic architecture plan for warehouse)
9. Ensure ETL technical alignment with the ETL Development Standards amongst major departmental projects for Data Warehouse
10. Develop ETL best practices, standards, templates and methodologies in a DataStage environment in accordance with DataStage standards and ETL Development standards or Industry standards
11. Implement Configuration Management controls to ensure quality and supportability of the resulting Data Warehouse (DW)/Data Management (DM) environments while adhering to the Iterative Methodology
12. Review Business Intelligence (BI) client requirements documentation such as BRD and BUC
13. Define and assist with ETL tool installation, configuration and integration strategies
14. Automate data feeds from external third party sources outside the organization as required
15. Participate in the design, development and testing of ETL jobs, scripts and routines in accordance with the Service Lifecycle Management Framework
16. Develop the ETL requirements and formulate the ETL architecture document that would require modification to any changes made
17. Participate in ERWin and IDA model reviews
18. Shred XML Data into relational tables using DataStage
19. Develop and maintain an integrated ETL architecture
20. Develop detailed development plans
21. Perform code walkthroughs
22. Develop ETL specifications and ETL design diagrams
23. Define ETL metadata capture solution
24. Define primary and secondary data captures strategies for internal and external data sources
25. Provide advice to developers and designers
26. Coach, mentor and train ETL designers and developers to perform any of the above.

<b>Deliverables</b> (List of excepted deliverables to be produced or provided)	<b>Due Date</b> (if applicable)
Weekly progress reports	Weekly
Provide impact documents in (Word or Excel or pdf) format which include detailed technical tasks to be completed as well as level of effort required to complete these tasks, assumptions and dependencies	As defined in Dev Schedule



Provide option analysis documents as requested	As defined in Dev Schedule
Develop EL requirements and formulate ETL architecture	As defined in Dev Schedule
<b>Reporting Requirements</b>  The Contractor will provide the following reports to the Technical Authority: <ul style="list-style-type: none"> <li>a) Time sheets both electronic and hard copies for each resource showing the days and hours worked to support charges claimed in the invoice.</li> <li>b) Invoices must be submitted as outlined in the contract.</li> </ul>	